Gates Grant Administration

Missouri State Library

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Opportunity Online Hardware Grant

- July 9, 2009—the Gates Foundation met in Chicago with Intermediaries from the 11 states selected for the grant
- July 16, 2009—the Gates Foundation officially announced the grant
- July 17, 2009—Opportunity Online Hardware Grant Administration Manuals were sent
- July 24, 2009—the Missouri State Library Gates_Grant web site became live at:
  http://www.sos.mo.gov/library/development/grants/Gates_Grant.asp

Enclosures with Admin Manual

- A letter from Margaret M. Conroy explaining what you need to do now:
    - Complete the Contact Form--note the web address on the bottom of the form (return by FAX) by July 31
    - Grant Applicant Eligibility and Certification" pages (on **yellow** paper—MAIL only)
    - Review the Grant Admin Manual
    - Attend a Grant Review Webinar session of LiveMeeting
- Details on the amount of the library or library system award. If the library has multiple eligible branches, a Branch Detail Sheet was included.
- Certificate of participation for the library to display
- Questions on contents of the mailing?

What else is happening?

- We are collecting copies of articles that were in the news (mail copies—we have found faxed copies of newspaper print comes out with very poor quality)

- We are receiving mailed **yellow** applicant eligibility and Certification signed pages from section 2 of the manual—Have received all but 1

The Administration Manual

- There are eight (8) sections to the manual
- The Table of Contents gives you an overview of the manual by section
- Note there is State Library contact information on the Table of Contents
- Also, note that the web site address needs to be changed to add the red text to the web address: http://www.sos.mo.gov/library/development/grants/Gates_Grant.asp
- Each section starts with an Index page explaining that section's contents
- Small libraries will have information about programs written into the grant specifically to help small libraries such as Librarian Substitutes and Tech Buddies—more on them later
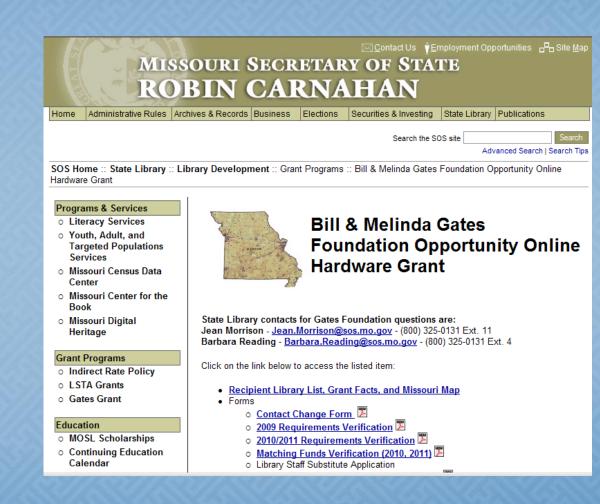
Section 1—General Information

- Instructions for attending a LiveMeeting
- Q & A about the grant—Includes what can be purchased—Page 2—Questions on acceptable expenditures
- Deadlines Calendar
- Grant Recipient List

Before the Manual—the State Library Gates Grant Web site

We will go to the State Library Web Site live to see the four tabs:

- Main Page
- Map and facts
- Newsletters
- Webinar schedule and connection instructions

☒ Contact Us ♀ Employment Opportunities ⊡ Site Map

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Programs & Services
- o Literacy Services
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- o Missouri Census Data Center
- o Missouri Center for the Book
- o Missouri Digital Heritage

Grant Programs
- o Indirect Rate Policy
- o LSTA Grants
- o Gates Grant

Education
- o MOSL Scholarships
- o Continuing Education Calendar

Bill & Melinda Gates Foundation Opportunity Online Hardware Grant

State Library contacts for Gates Foundation questions are:
Jean Morrison - Jean.Morrison@sos.mo.gov - (800) 325-0131 Ext. 11
Barbara Reading - Barbara.Reading@sos.mo.gov - (800) 325-0131 Ext. 4

Click on the link below to access the listed item:

- **Recipient Library List, Grant Facts, and Missouri Map**
- Forms
  - o Contact Change Form ⬘
  - o 2009 Requirements Verification ⬘
  - o 2010/2011 Requirements Verification ⬘
  - o Matching Funds Verification (2010, 2011) ⬘
  - o Library Staff Substitute Application

Section 2

- Gates Grant Agreement/Application

  - This application explains the responsibilities of the library when working with the State Library to successfully complete the Gates Grant.

  - If your library has <5 full-time paid employees, your application should be titled "Includes Librarian Substitute"

  - Two **Yellow** pages at the end of the agreement were to be signed and returned to the state library by September 1 (Since this is for the State Library, being late will NOT affect eligibility—we will not be able to pay a library without State Library authorization provided by these signatures.

Section 2—Requirements Verification Form

- 2009 Requirements Verification Form
  - Enter the <u>Library Name</u> if it is not present
  - PLA "Turning the Page" symposium
    - Enter the names of the representatives (minimum 1 library employee—preferably the director) a second employee of the library or strong community supporter is encouraged to attend, a third person is encouraged to attend but this person may be a member of the community, such as a board member, trustee, friends group member, or strong community supporter
  - Register at http://www.sustaininglibraries.org using conference code 56123

Section 2—PLA "Turning the Page" Symposium

- After the Yellow Fax sheet is information on the PLA Symposium—You should have received a packet from PLA

- Login to register on line at www.SustainingLibraries.org and the

- "Conference code" is 56123

- A schedule of registration and events is on this page as well

- You should make travel arrangements, **if** travel involves a leased van or bus, PLA should be contacted as soon as arrangements are made so they can pay the leasing company directly

- You can travel on AmTrak, flying will only be reimbursed if it would be less than driving mileage

- We are encouraging everyone to bring a Hawaiian shirt, skirt, or dress for November 4 to welcome our visitors from Hawaii who may be half awake (3 AM!!!) and very cold– Not sure about Vermont, it will probably seem like summer to them!

ALA/UMCP Survey

- The ALA/FSU survey has a different name this year. It is still conducted by the same group, they have just moved from Florida to University of Maryland College Park

- The survey is <u>currently available</u> from **September 8** to **November** 6—Use your FSCS/NCES code when you log in at **http://www.plinternetsurvey.org**

- A pdf file of the questions is available at the bottom of the log in

- Surveys must be done online, no paper copies allowed

- Be sure to click on the verification button when you are finished with the survey. If you do not see a "Thank You…", you are not finished!

ALA/UMCP Survey

- Upon completion of the ALA/UMCP survey use the 2009 Requirements Verification form to enter:
    - The name of the person who completed the survey
    - That person's position at the library
    - The date it was completed
- After Requirement 1 & 2 are completed:
    - Sign and Date the form to verify both requirements
    - Fax the form to the State Library by December 15, 2009
- Most communication from me will be direct to you based upon what was entered on the Contact Info sheet, but Show Me Express will also contain notices—especially if it is for all libraries in the state

Section 3-Matching Funds Verification Form for Phase I 2010

- Matching Funds Verification Form for 2010 (**YELLOW**)

- Discussion about what fits in each of the 3 categories

- What qualifies as "supporting details" on a separate page?

- When you have your matching funds, you should fax or mail this form to the State Library DEADLINE-- March 1, 2010—the sooner it is in, the sooner the money is sent to your library—(Anticipate January-April timeframe). You can buy your computers at any time and accept the money as a reimbursement or wait until you have your money—You must buy, install, and complete TechAtlas by September 15, 2010 (and in 2011, September 15, 2011)

- This form signals us to begin processing your money—we must have the funds disbursed by May 1, 2010—or we have to return your money to the Gates Foundation and your participation ends!

What happens next?

- When all verifications have been received, the State Library will send you a certification form, a request for payment, and possibly a Purchase Order to sign

- These forms are returned to the State Library by MAIL ONLY

- When they are received back at the State Library, payment will be processed

- Expect payment within 45 days of submitting the signed forms

- All money must be sent to libraries by May 1 or be returned to Gates Foundation

2010 Requirements Verification

- After you receive your money, use the 2010 Requirements Verification form to verify the following:

- Purpose 1—Deadline **September 15, 2010**
  - That patron computers were purchased
  - That the computers were installed
  - That the new computers were entered into TechAtlas

- Purpose 2—Deadline **December 1, 2010**
  - Verifies that the ALA/UMCP survey was completed

- The form will be faxed or mailed two times.

Section 4—Phase II—2011

- Matching Funds Verification for 2011—due by March 1, 2011—can be faxed or mailed
  - Same form as 2010—verifies the library has their matching funds
- When this form is received, a certification form, request for payment, and Purchase Order will be processed
  - Library should read, sign, and return by MAIL ONLY
- Payment will be processed by the State Library before May 1, 2011. Any funds not disbursed by May 1, 2011 must be returned to Gates Foundation.

2011 Requirements Verification Form—Phase II—Due Sept. 15, 2011

- 2011 Requirements Verification Form

- <u>Requirement 1</u>
  - Verifies that patron computers were purchased
  - Verifies that the computers were installed
  - Verifies that new computers were entered in TechAtlas

Continued—Due Dec. 1, 2011

- <u>Requirement 2</u> at the bottom of the form verifies that the library has completed the ALA/UMCP survey

- Return the form to verify survey completion

- The Bill & Melinda Gates Foundation, Opportunity Online Hardware Grant is finished

- Each year (2009, 2010, and 2011) the State Library will give you a short 20 or less question survey on this grant

Section 5

- TechAtlas—

  - Regional workshops will be conducted in February 2010 for libraries that must complete a new Technology Plan in the spring of 2010

  - If you receive Internet from MOREnet or plan to file for E-rate, this must be done every 3 years

  - Training on the State Library Web Site will be helpful when entering Inventory, a copy will be sent in a future mailing or you may print a copy and put it in this section

Section 5—Annual Forms and Deadlines

- This document lists deadlines for submitting forms to the State Library. It is included so libraries can plan workload

Section 6—Librarian Sub

- This is a program paid for by the State Library portion of the Gates Grant

- If your library has 5 or fewer full-time paid employees, your library qualifies for this program

- Information such as the Work Time Detail sheet will be in this section

- This is for the days when the director is gone to the "Turning the Page" symposium

- Payment will be processed with the Work Time Detail sheet

- Submit the form as soon as possible after returning for quick payment

- If your library does not qualify for this program, this section can be used to store purchasing information

Section 7—Purchasing Help

- Minimum Specifications—Computers should be "Business Class" not "Personal" computers

- Must meet State Library minimum specifications

- Must be new, not reconditioned

- Software can be purchased at a deep discount through TechSoup—how to set up purchasing is on the back of the handout on TechSoup

- Early Literacy Stations DO qualify if desired by the library—children's computers do not have to be on the Internet

- LSTA Grant Call Schedule—Gates funds left over after the computer purchase CAN be used as matching funds for LSTA grants

- Funds left over are intended for upkeep of the computers and their environment. Hardware, extended warranties, software, peripherals do qualify

Section 8 Newsletters

- The Pre-grant Newsletter is already in the Grant Admin Manual

- Use this section to add future editions

Tech Buddys—What is this?

- Larger libraries with more expertise in selecting and setting up computers will assist very small libraries

- This is paid out of the State Library portion of the grant, and costs the participating libraries nothing

Questions?

- Please call or e-mail me if you have any questions.
- New questions will be included in future newsletters.
- Suggestions are welcome!!!
- During the next two years I will be visiting all 120 of the recipient libraries
- Don't forget the TechAtlas Technology Planning workshops in February—priority will be given to libraries that need to complete a technology plan in 2010
- A plug for filing for E-rate—Rebecca Miller, MOREnet will be conducting a workshop—watch Show Me Express!!
- If you do not get electronic Show Me Express, they are stored at and you can register on this page: http://www.sos.mo.gov/library/showme_express/